

SFA

Solution Acquisition Planning

Agenda



- **Solution Acquisition Planning (SAP) Overview**
- **SAP in the Vision Phase**
 - Estimating Activities
 - Acquisition Strategy / Beginning the Plan
- **SAP in the Definition Phase**
 - Updating the Plan
 - Acquisition Management
- **Review and Summary**

SAP Analogy



What is Solution Acquisition Planning (SAP)?

SAP is similar to hiring an architect to build your home...



You would never let an architect begin building without approving a detailed plan that stated:

- Who would do the work?
- Duration of the work?
- Cost of the work?
- Dependencies?

SAP Defined



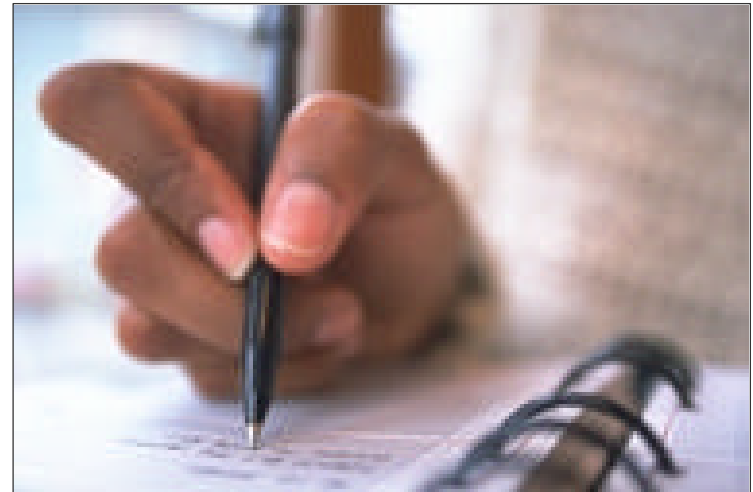
Solution Acquisition Planning (SAP) ensures that planning documents are prepared during solution acquisition planning and maintained throughout the process.

SAP enables SFA to comply with:

- GPRA
- Brooks Act
- Clinger-Cohen
- FASA

Components of SAP Involve:

- Estimating Acquisition Time
- Estimating Acquisition Costs
- Recording Actual Time
- Recording Actual Cost



SAP Objectives



As described in the Vision phase of the SLC, SAP begins with the determination of a business need.

- A well developed Acquisition Strategy is documented
- Repeatable planning effort takes place
- Project manager manages and measures the plan
- Improve planning effort based on benchmarks established over time
- Clearly define SFA and contractor responsibilities

Benefits of SAP



SAP provides a process that allows for better solution acquisition planning, enabling more projects to come in on-time and within budget.

- SAP helps SFA meet Performance Objectives to:
 - Increase Customer Satisfaction
 - Increase Employee Satisfaction
 - Reduce Unit Costs
- Results:
 - Using the appropriate processes means higher quality work (Increased Employee and Customer Satisfaction)
 - Repeatable processes means lower cost (Lower Unit Costs)

SAP

SAP Tools

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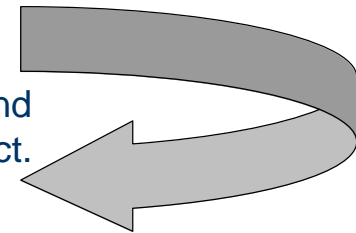


Solution Acquisitions in the SLC

The SLC is a framework to guide a successful Solution Acquisition from business need to deployment and support. The outline for the SLC is illustrated below.

Planning/ Managing	Acquisition Planning and Managing				
	Vision	Definition	Construction	Deployment	Support
Phases	Problem Assessment	System Requirements	Detailed Design	Deployed Solution	Production Services
	Solution Recommendation	Preliminary Design	Accepted Solution		
Results					

The Solution Acquisition Plan manages the processes used and the deliverables produced throughout the lifecycle of the project.





CMM in the SLC

SLC is further enhanced by SFA's Solution Acquisition Capability Maturity Model (CMM). This is a framework for organizational improvement.



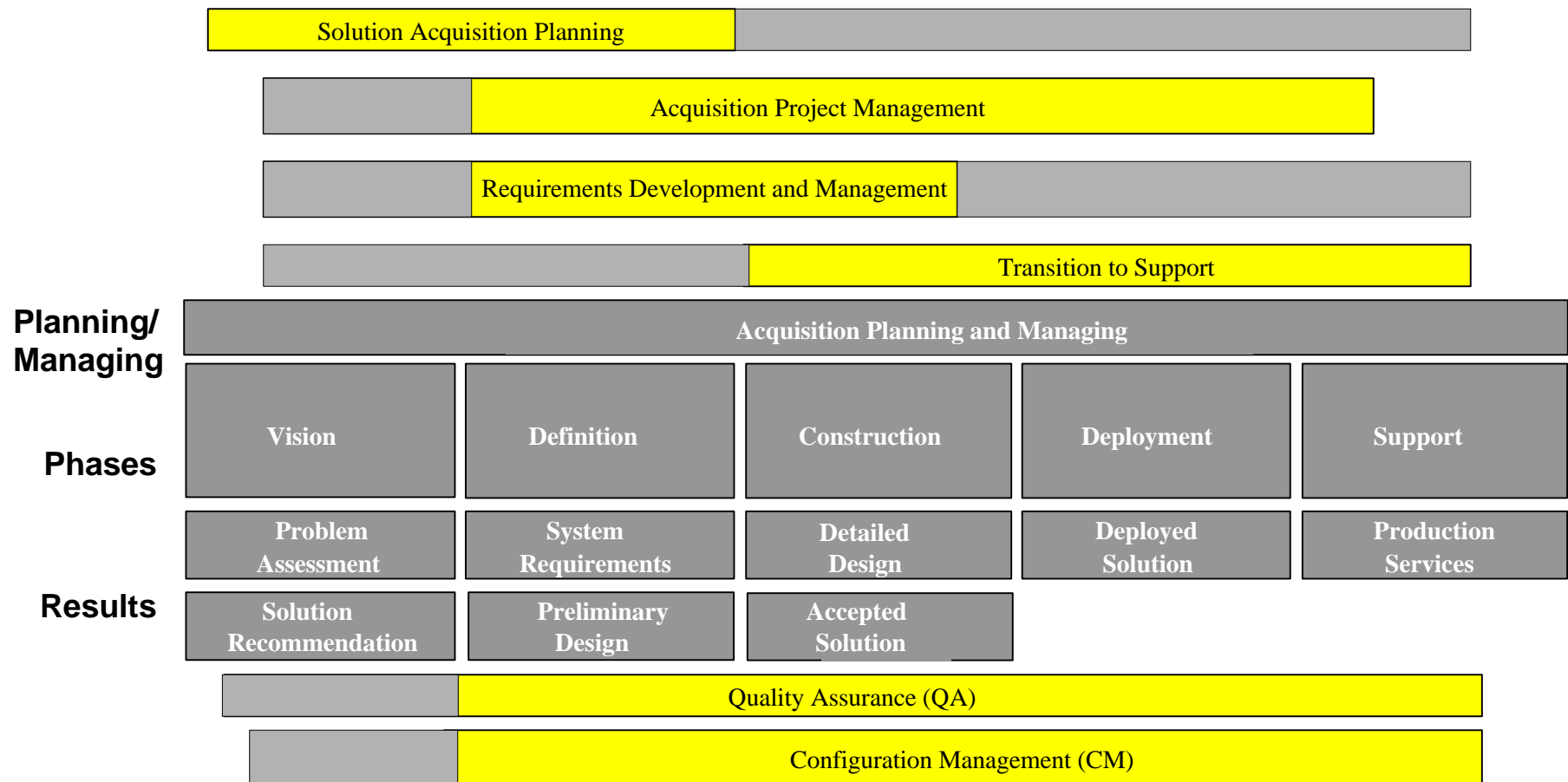
The SLC is enhanced by 2 of Software Engineering Institute's CMM's:

- Software Acquisition CMM
 - addresses the project's **entire software acquisition** process and life cycle support
- Software CMM
 - model for **benchmarking** and **improving** the software development process

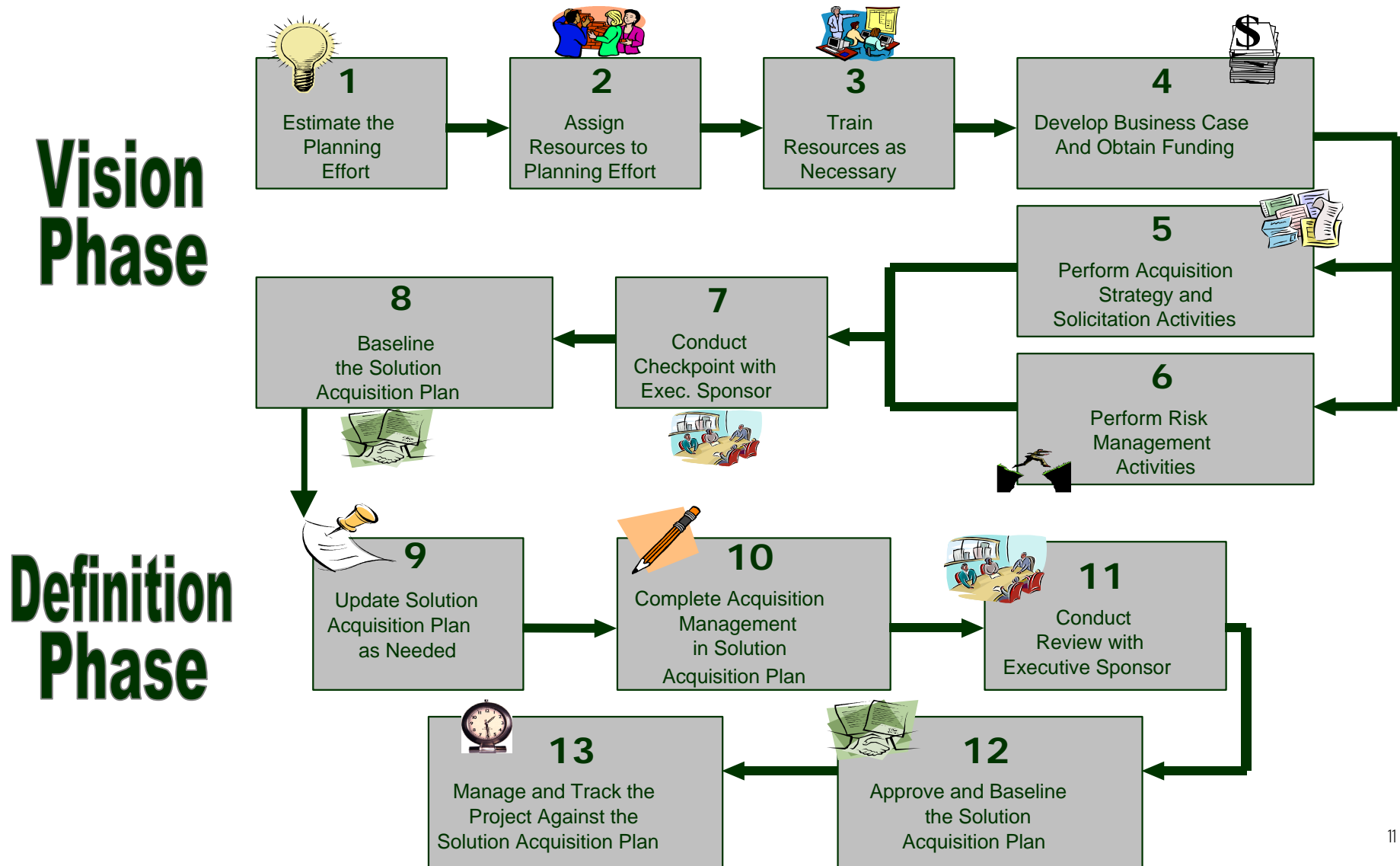


SLC and CMM

The 6 Key Process Areas were chosen from the Software Acquisition and Software CMMs.



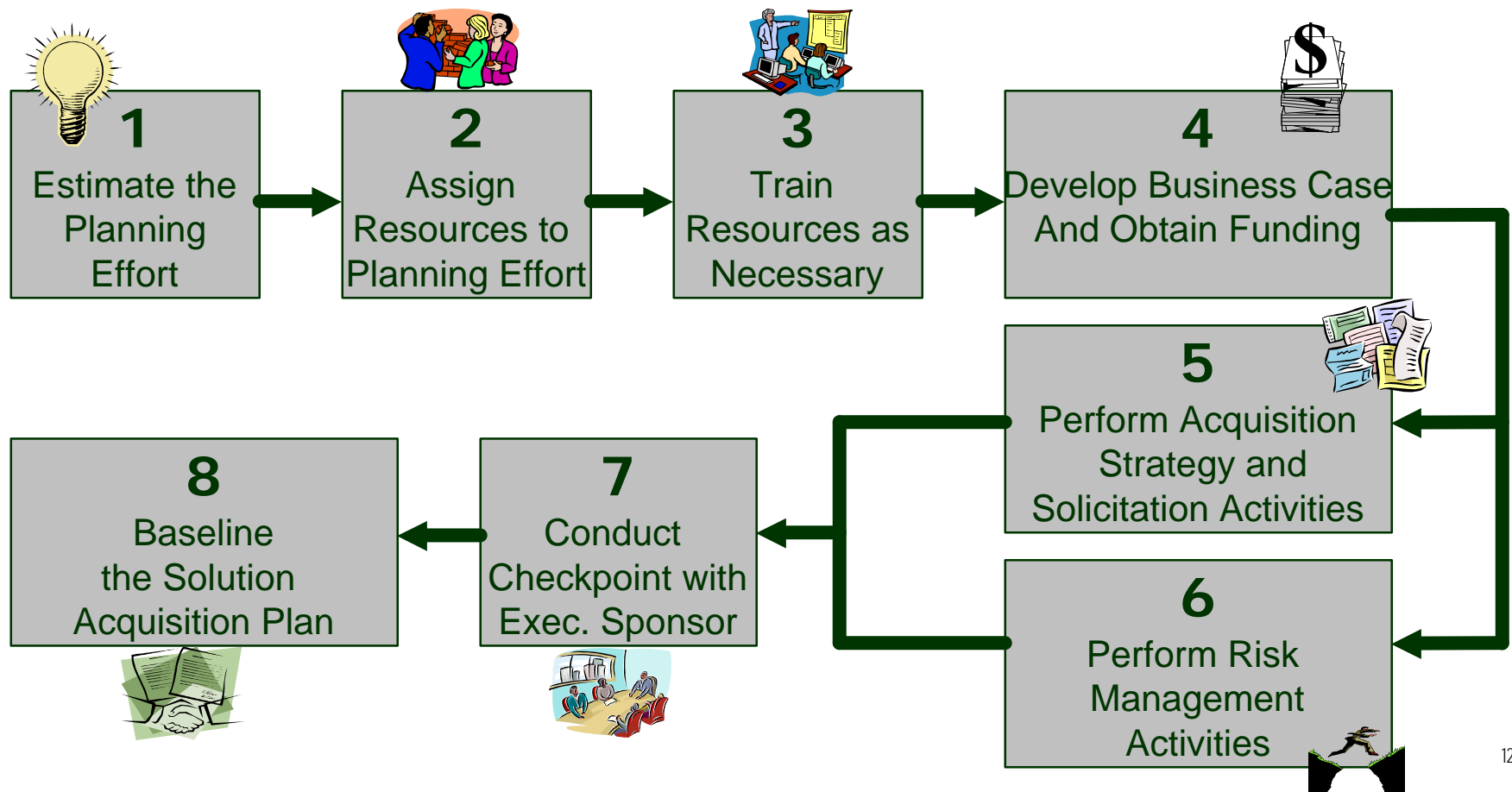
Planning the Solution Acquisition



Solution Acquisition Plan Overview



Solution Acquisition Plan in the Vision Phase:





Pre-Business Case Planning

These steps are performed pre-business case to estimate the number of hours to plan the acquisition and obtain funding.

**1**

Estimate the
Planning
Effort

**2**

Assign
Resources to
Planning Effort

**3**

Train
Resources as
Necessary

1 Complete Estimating Worksheet

2 Find appropriate Acquisition Resources

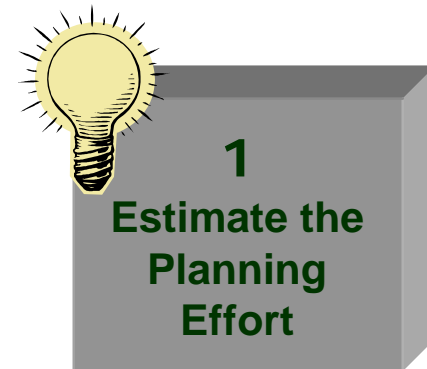
3 Find needed/available training

Using the Estimating Worksheet



The Estimating Worksheet is a tool to:

- Forecast planning activities through the Task Order award
- Estimate, monitor and compare actual data with the initial estimated data
- Track data consistently and accurately, which will enable future, reliable benchmarks to be determined

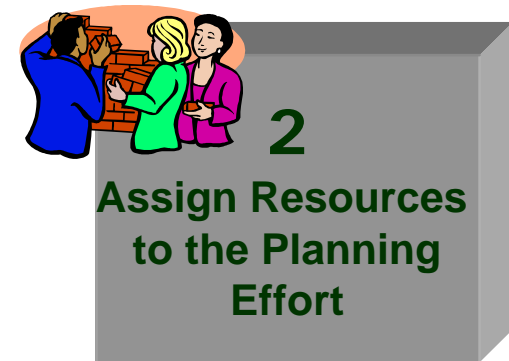


Resources



Identify and Assign Roles to Members of Acquisition Team.

- Roles may include:
 - Project Manager
 - Subject Matter Expert
 - Information Technology Representative (ITR)
- All SFA and Mod Partner personnel involved in the project should be listed in “**Acquisition Resources**” chart of Solution Acquisition Plan
- Typically, members of the Acquisition Team will roll onto the IPT

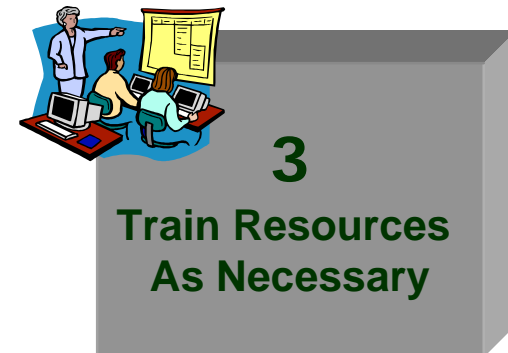


Training



Determine training needed to ensure each individual team member has adequate skills for the Acquisition project.

- Document this information for future reference in the Solution Acquisition Plan.
- Several members of the team may require additional training to expand their existing skill sets.



Investment Review



Once the estimating tools and initial planning steps have been completed, the IRB process begins.



- The IT Investment Management Procedures are followed to obtain funding.
- The Business case is developed and must ultimately receive approval from IRB.
- As this task is completed, actuals will be entered in the Estimating Worksheet.

IT Cost Estimating Tool



Objectives and Benefits of the tool include:

- Consistency
- Checklist of cost items
- Enhanced validation
- Rigor and thoroughness to the estimate
- Easy to Use – Does not require financial expertise
- Supports SLC and CMM efforts, also 300B reporting

How the IT Cost Estimating Tool is Used



All estimations are based on user inputs from this worksheet

- Short descriptions and contact information provided as inputs
- Ability to enter in “other” cost items that do not appear in checklist
- Number of SFA FTE’s and GS Level captured for use by CFO and 300B reporting

Estimations

- All workday and cost estimates shown here.
- Shows contact information for each cost item in comments
- Maps each cost item to the SLC
- Ability to enter actual cost data and see variances and flagged items

Acquisition Strategy



Acquisition Strategy and Solicitation Activities address the following five areas:

- Solicitation
 - Sources
 - Competition
 - Contract Considerations
 - Acquisition Constraints
-
- At conclusion, SOO and TO actuals are entered into the Estimating Worksheet.



Perform Risk Management



Risk Management is a need that is addressed in the Solution Acquisition Plan. Initial, high level risks are identified in the Business Case, but the bulk of Risk Management is performed here.

- Risk is managed by the Project Manager.
- The Risk Management tools will be found in the Project Management Workbook.
- Risks will be monitored throughout the project.
- Risk is “mitigated” as need arises.





Review and Baseline

After the Solution Acquisition Plan is completed, it is reviewed and then baselined if found acceptable.

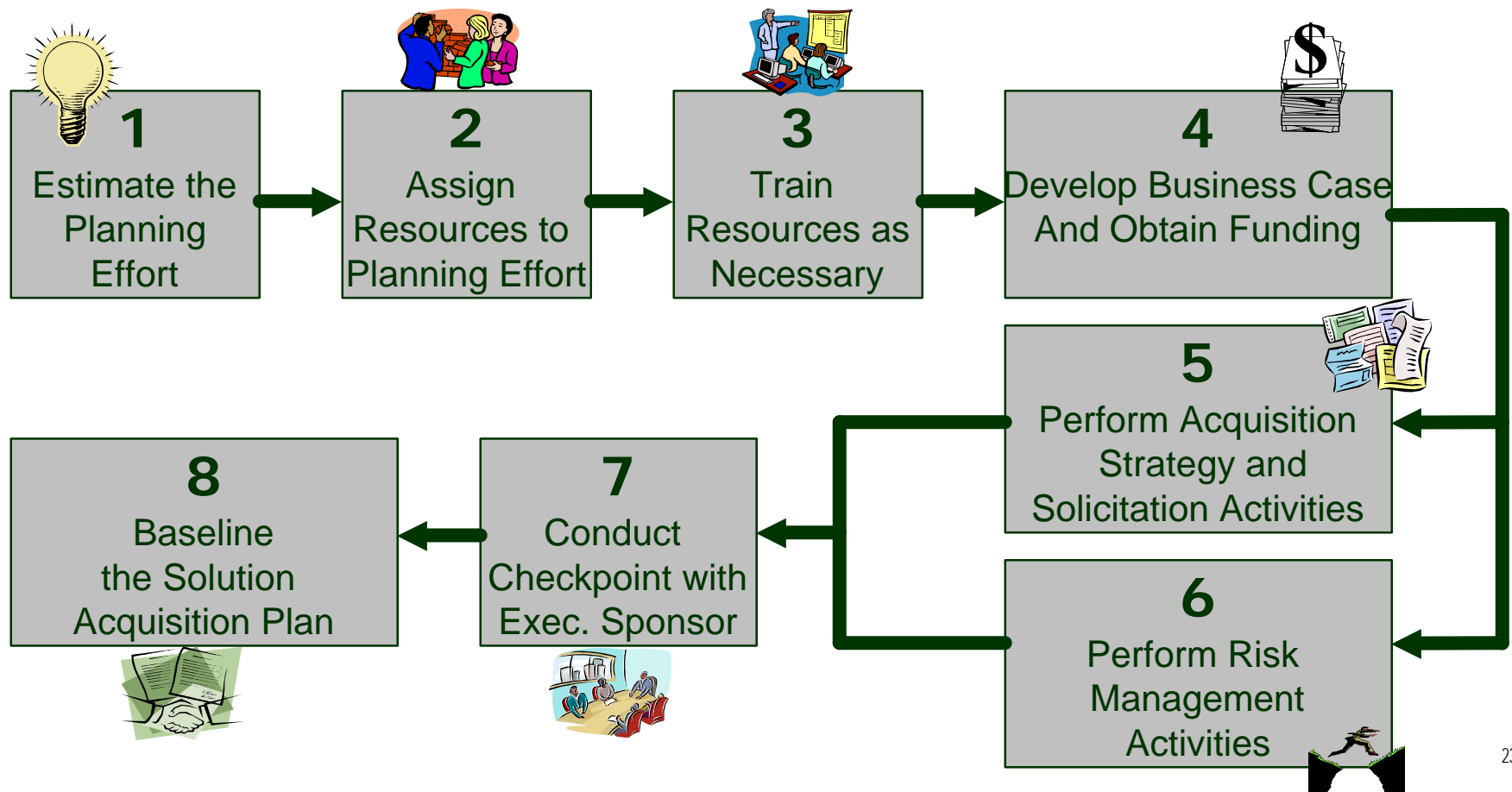
The baselined Solution Acquisition Plan should include the appropriate areas addressed in the business case, as well as what is needed to plan for a project.





Conclusion of the Vision Phase

The Solution Acquisition Plan is now baselined in the *Vision* Phase of the SLC and ready to be updated in the *Definition* Phase.





Solutions Acquisitions and the SLC

Vision

Definition

Construction

Deployment

Support

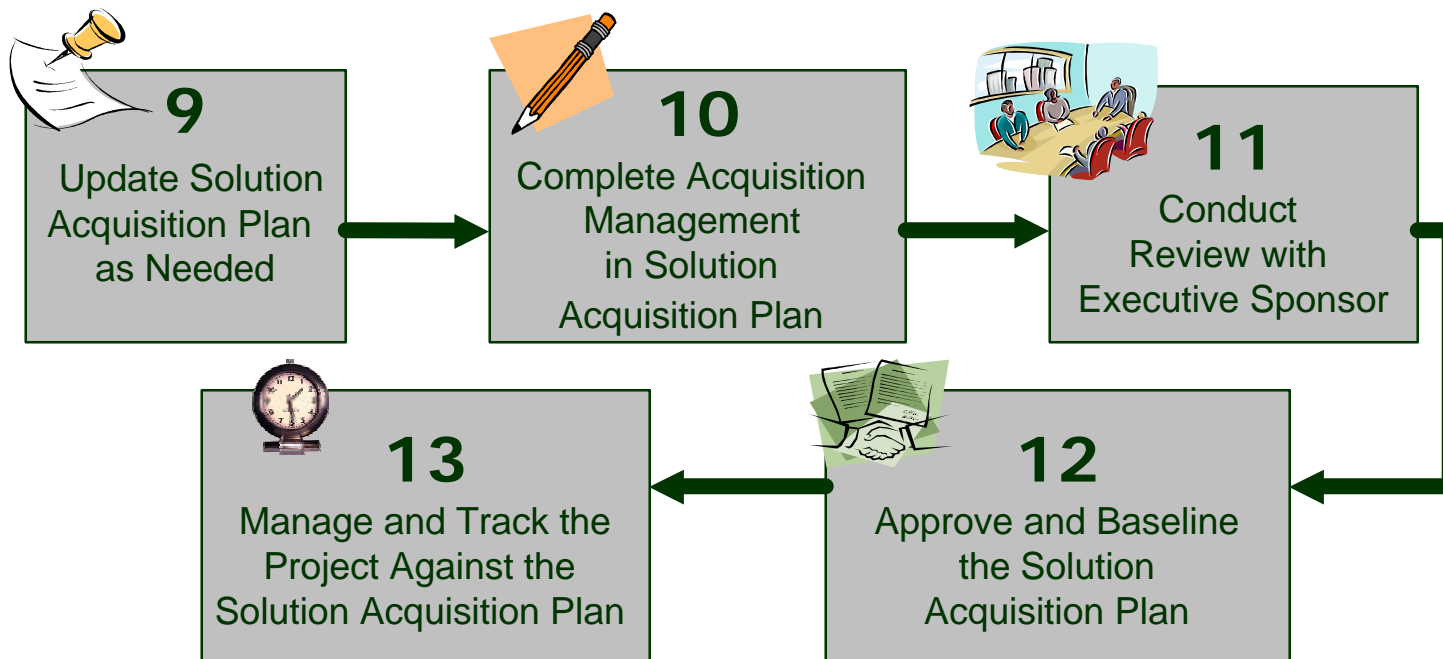


**We now move to the
Definition Phase for
Acquisition Planning.**

The Definition Phase



The Solution Acquisition Plan is continued in the *Definition* Phase



Updating the Plan



The Acquisition Plan will be updated as necessary based on possible changes in areas such as:

- Scope
- Costs
- Resources
- Risk
- Schedule



Acquisition Management



The Acquisition Management activities include:

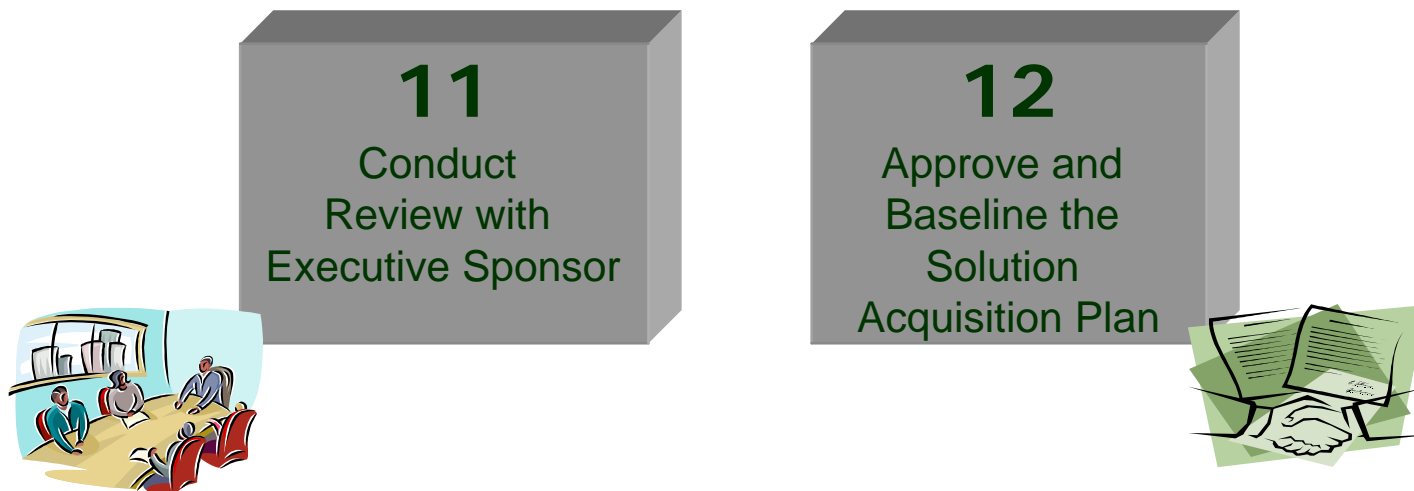
- Project Management Activities
- Requirements Development and Management
- Contract Tracking and Oversight
- Evaluation
- Transition to Support
- Configuration Management
- Quality Assurance
- Measurement



Review and Approve Solution Acquisition Plan



- Review the Solution Acquisition Plan with team members.
- Review the Solution Acquisition Plan with the Executive Sponsor.
 - Each version will then be approved and baselined.



Using the Solution Acquisition Plan



- Project Management functions should be carried out and reviewed periodically.
- Continually update the plan with information from steps 9 – 13 throughout the construction, deployment and support phases.
- Evaluate the final deliverable compared to the estimated Solution Acquisition Plan.
- Use the Solution Acquisition Plan to manage and track the project.





Conclusion of the Definition Phase

The Solution Acquisition Plan is completed in the Definition Phase, but maintained throughout the entire lifecycle of the project.



Review and Summary



- **Solution Acquisition Planning (SAP)** ensures that planning documents are prepared during solution acquisition planning and maintained throughout the process
- SAP begins with the **determination of a business need** and endures **throughout the lifecycle**
- SAP provides **streamlined, predictable, repeatable, measurable** processes that help SFA meet Performance Objectives:
 - Increased Customer Satisfaction
 - Increased Employee Satisfaction
 - Reduce Unit Costs



So what did we do?

During this session we...

Achieved understanding of:

- SLC and CMM
- SAP Defined
- SAP in the SLC
- Benefits of SAP

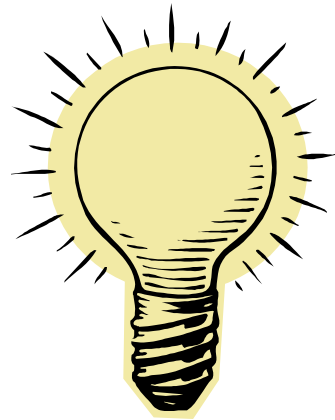
Accomplished a walk-thru of:

- Solution Acquisition Planning Process
- Estimating Worksheet
- IT Cost Estimating Tool





Acquisition Planning Estimating Activity

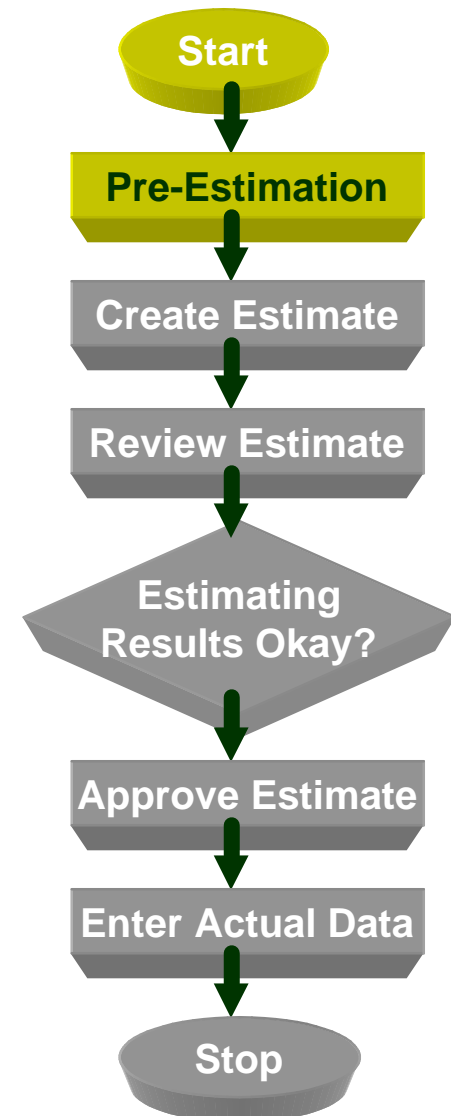




Pre-Estimation Considerations

Before starting the Estimating Worksheet, the following should be considered:

- What are estimating risks?
- What are estimating assumptions?

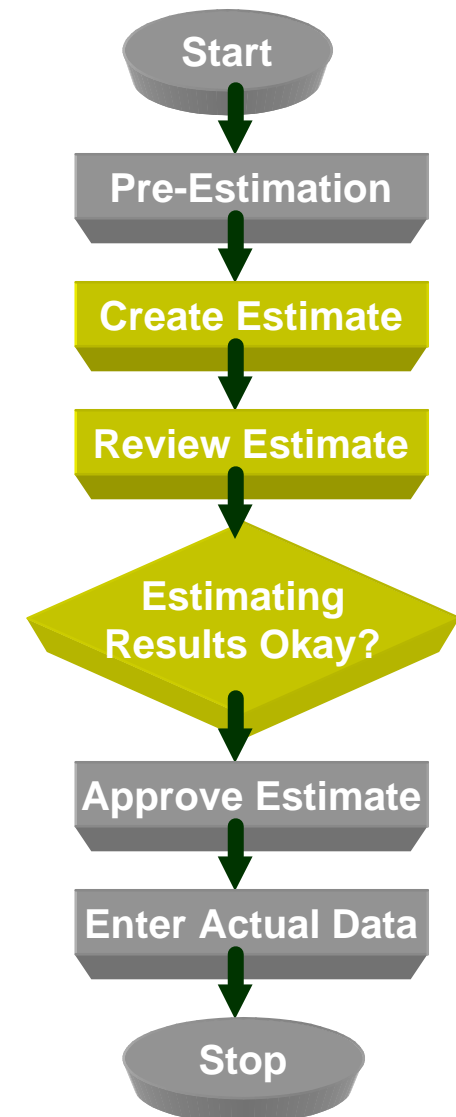


Estimating Activities



Complete the Estimating Worksheet

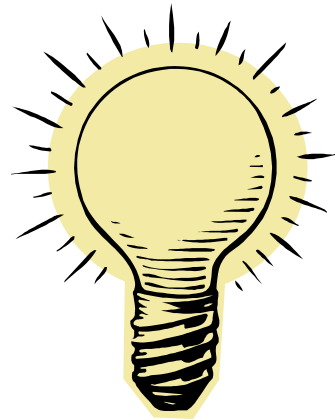
- Complete the estimates aligned to the 5 stages of the Planning process:
 - Business Case
 - Decision Support Group
 - IRB
 - SOO
 - TO
- Complete the Rationale for Estimation
- Review the Completed Estimating Worksheet
 - Conduct Peer and Independent Reviews
 - Acceptable estimates are approved
 - Unacceptable/ unreasonable estimates are reworked
- Total Estimated Acquisition Planning Days will be used in IT Business Case Cost Estimating Template.



Team Activity



Now it's your turn! Complete the Acquisition Planning Estimating Worksheet!



Team Activity



Review team solutions.

